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ABSTRACT

Contained in this working report are the results of the Community Forum on Financial Assistance held on September 24, 1974 at Rhode Island Junior College. The two-hundred and fifteen people invited to the conference were asked by mail to rank the eight financial aid criteria in terms of importance for possible use in selecting financial assistance recipients. Thirty-two of these anonymous questionnaires were returned by mail in advance of the conference. The similarity between ranking of the "pre" and the "post" conference financial aid criteria included financial need, scholastic ability, time enrollment, number of years completed, location of institutions, student's programs of studies, and student's age. (MJM)

ED104281

FINANCIAL ASSISTANCE FOR POSTSECONDARY EDUCATION

WORKING NOTE #5

"A Report on Constituent Involvement in Decision-Making

The Forum on Financial Assistance"

September 24, 1974

Rhode Island Junior College
Warwick, Rhode Island

U.S. DEPARTMENT OF HEALTH
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ABSTRACT

Contained in this working note are the results of the Community Forum on Financial Assistance held on September 24, 1974, at Rhode Island Junior College.

The two-hundred and fifteen people invited to the conference were asked by mail to rank the eight financial aid criteria in terms of importance for possible use in selecting financial assistance recipients. Thirty-two of these anonymous questionnaires (Shown in Appendix A) were returned by mail in advance of the conference and the resultant ranking of financial aid criteria is summarized in Table 1B.

Table 1B

Distribution of Rank Preference to
Eight Possible Criteria for Financial Assistance Determination
by Percentage of Responses

CRITERIA	Resultant Rank	Percentage of Responses by Rank Preference 1	2	3	4	5	6	7	8	Resultant Score*
Financial Need	1	77%	21%	--	--	--	--	--	3%	1.43
Scholastic Ability	2	18%	41%	18%	6%	12%	3%	3%	--	2.77
Time Enrolled	3	--	9%	28%	22%	10%	9%	9%	6%	4.35
Number of Years Completed	4	--	10%	19%	19%	16%	6%	22%	3%	4.59
Location of Institution	5	6%	6%	6%	9%	28%	19%	9%	16%	5.17
Type of Institution	6	--	6%	3%	19%	16%	6%	31%	13%	5.52
Student's Program of Studies	7	--	--	3%	22%	6%	34%	16%	19%	5.95
Student's Age	8	3%	6%	13%	3%	6%	19%	9%	41%	6.01

*See Appendix D for analysis techniques.

Sixty-two of the eighty-five participants ranked the eight financial assistance criteria at the end of the forum. The resultant ranking of the criteria is summarized in Table 2B.

Table 2B

Distribtuion of Rank Preference to
Eight Possible Criteria for Financial Assistance Determination
by Percentage of Responses

CRITERIA	Resultant Rank	Percentage of Responses by Rank Preference 1	2	3	4	5	6	7	8	Resultant Score
Financial Need	1	93%	7%	--	--	--	--	--	--	1.08
Scholastic Ability	2	4%	91%	6%	--	--	--	--	--	2.04
Time Enrolled	3	--	2%	39%	46%	7%	2%	--	2%	3.68
Number of Years Completed	4	--	8%	32%	24%	16%	16%	5%	--	4.19
Location of Institution	5	--	2%	20%	17%	29%	10%	12%	10%	5.01
Type of Institution	6	--	--	16%	14%	14%	38%	14%	5%	5.40
Student's Program of Studies	7	--	--	3%	6%	6%	20%	43%	23%	6.68
Student's Age	8	--	--	3%	--	26%	3%	14%	54%	6.87

Both the thirty-two pre-conference questionnaires and the sixty-two post-conference questionnaires were anonymous. It was, therefore, not possible to determine the change caused by the forum on individual participants; nor was it possible to precisely determine the "pre" vs. "post" questionnaire effect of the forum, since the thirty-two invitees, who mailed in the questionnaire in advance of the forum, composed a different sample from the sixty-two people who attended the forum.

The similarity between ranking of the "pre" and the "post" conference financial aid criteria is striking. The mean rank of the "pre" rankings and the "post" rankings are presented in the last column of Table 1 and Table 2, respectively. The eight criteria are ranked in identical order by the "pre" and the "post" respondents. The most important change was in the "Student's Program of Studies."

While the identical order of the "pre" and the "post" rankings is the most striking outcome, the "pre" and the "post" rankings did differ in other respects. The four criteria ranked as "most important" on the "pre" rankings were ranked even more extreme in importance on the "post" rankings. The four criteria ranked as "least important" on the "pre" rankings had even less importance on the "post" rankings. On the "post" rankings, the sixty-two respondents were especially clear in their ranking of the two most important criteria. Ninety-three percent of the respondents ranked "Financial Need" first, while ninety-one percent of these same respondents had ranked "Scholastic Ability" as second.

INTRODUCTION

On November 29, 1973, the Board of Regents identified financing postsecondary education as a priority item for planning activities for the Department of Education. In order to fulfill the intent of the law (16-49-4 subsection 3) requiring the Board of Regents to "communicate with and seek the advice of those concerned with and affected by its determinations..." the Department of Education utilized a forum process to obtain constituent's views on the specific subject of "who should receive priority for limited financial assistance resources."

The Department of Education's planning core group for financial assistance sought individuals and organizations who it believed might either be interested in participating in forum activities; or be capable of identifying individuals and organizations interested in attending. In total, two-hundred and fifteen individuals representing a cross section of Rhode Island public believed to be affected by decisions in the area of financial assistance, were mailed a package of materials (see Appendix A for first mail-out).

The invitees represented the following sectors:

A. Citizens
   1. Students
   2. Parents

B. Elected Officials
   1. General Officers of Rhode Island
   2. Rhode Island Congressional Delegation
   3. State Representatives
   4. State Senators

C. Governing/Planning Bodies

1. Board of Regents
2. Rhode Island State Planning Commission
3. Legislative Commission for Scholarships
4. Rhode Island State Advisory Council on Vocational Education

D. Agencies

1. Adult Correctional Institution
2. Department of Education
3. Vocational Rehabilitation
4. Commission for Human Rights
5. Youth Services Bureau
6. Career Education Project
7. Career Development Center
8. Opportunities for Veterans
9. Rhode Island Assistance Corporation

E. Social Organizations

1. N.A.A.C.P.
2. P.A.C.E.
3. Rhode Island Committee for the Humanities
4. Providence Human Relations Commission
5. Urban League of Rhode Island
6. Rhode Island Bar Association

F. Civic Organizations

1. Rhode Island League of Cities and Towns
2. League of Women Voters
3. Rotary of Providence

G. Educational Organizations

1. Rhode Island Association of School Superintendents
2. Rhode Island Association of Secondary School Principals
3. Rhode Island Association of School Committees
4. Rhode Island Association of Guidance Counselors
5. Rhode Island Congress P.T.A.
6. Volunteers in Rhode Island Schools
7. Independent School Association
8. Rhode Island Education Association
9. Rhode Island Federation of Teachers

H. Public and Private Higher Education Functions

1. Institutional Presidents
2. Financial Aid Officers
3. Director of Admissions
4. Undergraduate Student Senate Presidents
5. Graduate Student Senate Presidents
6. Faculty Senate Presidents
7. Alumni Association Presidents

I. Business and Industry

1. AFL-CIO
2. Old Stone Bank
3. Rhode Island Hospital Trust
4. Citizens Bank

J. Proprietary School Representatives

1. Cumberland School of Welding
2. DeFelice Real Estate School

3. Newport School of Hairdressing
4. Lafayette Academy
5. Barbizon School of Modeling
6. Katharine Gibbs School
7. Rhode Island Radio and Electronics
8. Rhode Island .rades Shop School
9. Nationwide Tractor Trailer
10. Sawyer School of Business

Of the total number of individuals who received invitational materials, seventy-five responded to confirm their attendance. Upon receipt of confirmation cards, participants were mailed a letter of "thank you" which outlined their role in the decision-making process and the tasks to be performed at the Forum (see Appendix B for second mail out).

On the evening of the Forum, participants assembled for official registration whereupon the total attendance body resulted in eighty-five participants (see Appendix C for list of participant body).

Participants in the Forum were asked to complete six tasks. These tasks were:

1. To examine the ranking of criteria as determined by the analysis of responses to the brief survey that accompanied the invitation to attend the Forum. The eight criteria, derived from a departmental survey of other states, were:
    a. Financial Need
    b. Scholastic Ability
    c. Time Enrolled

d. Number of Years Completed

e. Location of Institution

f. Type of Institution

g. Student's Program of Studies

h. Student's Age

2. To modify or endorse the order in which the criteria were placed by the entire participant body.

3. To identify the values and philosophical bases that underlie the placement of those criteria in the order as agreed by each group.

4. To re-rank the criteria on an individual basis, so that individual responses might be tabulated at the Forum for participant review of the changes that may have taken place as a result of further elaboration of the issues.

5. To simulate the allocation of resources to student types by using the top three ranked criteria in the order selected by each group.

6. To evaluate Forum activities.

This report is a summary of their responses to these tasks.

TABLE #1

Pre-Conference Survey

Prior to the conference, invitees were asked to rank the eight criteria (see Appendix A). Results of their ranking are presented in Table 1.

Clearly, there is no consensus from the thirty-four respondents as to the relative importance of the eight criteria for financial assistance determination.

If there were consensus, one rank for each criterion would have 100% of the responses.

Financial Need

The closest area to consensus is in the criterion of Financial Need. Seventy-seven percent of the respondents designated this criterion as rank number one. Further, 98% of the respondents viewed this criterion as being ranked no less than second in importance.

Scholastic Ability

The method of analysis ranks this criterion as number two, however, this criterion falls in a tenuous state when one considers that 42% of the respondents ranked it as less than second.

Time Enrolled/Number of Years Completed

These two criteria have scores which are so close that it is difficult clearly to distinguish one as out-ranking the other. One can observe that there is no consensus for each, with each being designated as ranked number two through eight.

The Remaining Four Criteria

The response pattern is extremely diffuse here, with spreads all across the board. Through further discussion, these items might be clarified and ranked appropriately.

TABLE 1 A Pre-Conference

Distribution of Rank Preference to
Eight Possible Criteria for Financial Assistance Determination
by Number of Responses

CRITERIA	Resultant Rank	Number of Responses by Rank Preference 1	2	3	4	5	6	7	8	Blank Responses	Number of Total Responses
Financial Need	1	26	7	--	--	--	--	--	1	--	34
Scholastic Ability	2	6	14	6	2	4	1	1	--	--	34
Time Enrolled	3	--	3	9	7	5	3	3	2	2	32
Number of Years Completed	4	--	5	6	6	5	2	7	1	2	32
Location of Institution	5	2	2	2	3	0	6	3	5	2	32
Type of Institution	6	--	2	3	6	5	2	10	4	2	32
Student's Program of Studies	7	--	--	2	7	2	11	5	6	2	32
Student's Age	8	1	2	4	1	2	6	3	13	2	32

B

Distribution of Rank Preference to
Eight Possible Criteria for Financial Assistance Determination
by Percentage of Responses

CRITERIA	Resultant Rank	Percentage of Responses by Rank Preference 1	2	3	4	5	6	7	8	Resultant Score*
Financial Need	1	77%	21%	--	--	--	--	--	3%	1.43
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Number of Years Completed	4	--	10%	19%	19%	16%	6%	22%	3%	4.59
Location of Institution	5	6%	6%	6%	9%	28%	19%	9%	16%	5.17
Type of Institution	6	--	6%	9%	19%	16%	6%	31%	13%	5.52
Student's Program of Studies	7	--	--	3%	22%	6%	34%	16%	19%	5.95
Student's Age	8	3%	6%	13%	3%	6%	19%	9%	41%	6.01

*See Appendix D for analysis techniques.

While there is unclarity, there are signs of intense disagreement for the criteria: location of institution and student's age. One can observe that respondents ranked each of the these criteria as first and last.

Group Workshops

Participants in the forum were asked to meet in small working groups to collectively react to the priorities of the eight criteria as determined by the pre-conference survey. It was thought that these discussions would provide an opportunity to clarify and expand upon individuals' understanding of the issues involved as well as an opportunity for participants to express their views. Group recorders were asked to provide brief summary statements of these discussions. Below are the reports of the group recorders.

Group 1

The group could not arrive at a consensus concerning the priority of the criteria presented.

The group was equally divided on two points:

1. That the criteria entitled financial need and scholastic ability should be packaged into another category as opposed to being individually treated.
2. The other half of the group felt that the priority #1 should be the demonstration of financial need as the prime requirement for a student to receive financial assistance.

Beyond this point, there were some concerns expressed that variables four through eight did not merit consideration.

Group 2

The entire group session focused opinions and discussion on Criteria #1 and #2. Criteria #6 was placed third, primarily because

it generated a lot of debate but was not necessarily considered a priority. The group felt that the remaining criteria should be placed at the bottom of the rank order, with the possibility of #8 being removed entirely.

There was much discussion on the placement of #1 and #2, at one time almost being considered a tie. It was finally decided that #1 and #2 should remain in that order but that more time and research should be put into how #1 and #2 could be combined in order to being about a fair and honest decision for a scholarship winner. It was the consensus that motivation should definitely be taken into consideration and not ignored completely; that a subjective evaluation be considered; that there is a very strong need at this time of serious economic and inflationary problems, to concentrate seriously on the middle class by trying to strengthen and blend financial need and scholastic ability.

The group finalized their discussion by pointing out that #1 and #2 were their main concerns and that without a doubt, financial need and scholastic ability should definitely be weighted together.

Group 3

Of the eight criteria only one was accepted as legitimate--Financial Need.

Financial Need was viewed as the only criterion that could be measured and administered equitably.

Group 4

Participants in this group were of varied backgrounds and concerns. They voiced serious objections to various aspects of the forum and generally resisted being forced to make a group decision.

They did, however, vote to rank four criteria in this order:

1. Financial Need
2. Scholastic Ability
3. Time Enrolled
4. Type of Institution

The group members expressed concern that there was not real agreement on the definitions of the terms which were voted upon.

The strongest value which seemed to emerge from the discussion was that students should have the maximum amount of choice regarding their postsecondary options.

Another value which emerged was that Rhode Island financial aid should be made to Rhode Island students attending Rhode Island institutions.

Most of the discussion centered around other issues than the first two choices to determine the validity of the other criteria. Several members thought that there is a real need to define what is meant by "scholastic ability."

Group 5

Many philosophical issues were discussed in group #5 before the members focused in at the tasks at hand. Participants were reluctant to rank who should receive financial assistance before they had an opportunity to vent some of their feelings concerning

education generally. Much of the initial discussion centered on whether or not education was contributing to individuals what was needed in a rapidly changing society (future shocks). Value of particular programs was also discussed at length--the liberal arts student vs. the vocational student. Strong feelings surfaced on student motivation and some individuals felt this should be the ninth criterion for financial assistance.

As the time became a factor, the group became more task oriented. With the exception of one individual, the group agreed that financial need should be ranked as #1 priority in awarding scholarship monies. The one individual held firm to the need of combining financial need with scholastic ability. The group ranked scholastic ability as #2 priority and percent of time enrolled as #3 priority in awarding scholarship monies.

Group 6

This group ranked four criteria in the following order:

1. Financial Need
2. Scholastic Ability
3. Location of Institution
4. Time Enrolled

Financial need was simply assumed to be important. The arguments differentiating need from ability were centered on why ability should not be first--i.e., it is not easy to measure; motivation is important, though it can be measured somewhat, etc.

There is a limited amount of money to go around these days. Keep it to help the students in state, then there will be enough per campus to make a difference, Provide aid for students studying in another state, if that state is in reciprocity on this matter.

The group thought that full-time students had higher expenses and less opportunity to work and therefore should be favored with assistance.

Group 7

This group displayed enthusiasm in discussing the issues. Everyone took part. In spite of the broad acceptance of need being the number one criterion, they did not pursue any discussion concerning the methods of determining need. There were no objections to accepting this broad measure so that discussion could progress to other criteria.

A good deal of time was spent analyzing scholastic ability, the group's choice as the second most important criterion. It was felt that the program of study should be relevant to a student's vocational objectives in order for the student to be considered for assistance. Additionally, new methods should be instituted in order to measure one's ability. The present system of measurement, SAT and class rank, may gauge academic abilities, although some members disputed the significance of these devices; however, consensus developed that other quantitative methods should be devised relative to broad, postsecondary education.

Because of time constraints, the remaining criteria received limited discussion. Consensus was accomplished for the third choice,"Number of Years Completed." It was felt that the continuing student in a block of study should receive priority over a new student.

Consensus was also reached for criterion four, "Time Enrolled." Part-time as well as full-time students should receive equal opportunity for assistance.

Group 8

This group demonstrated strong concern and interest. Little stimulus was necessary to launch the discussion.

Without exception, the primary concern of this group in discussing financial aid centered around the question of NEED. They felt strongly that changes should be enacted, and that these changes should be based on the financial need of the student. Examples of inequities in the present system were described at length which reinforced the group opinion that concrete adjustments must be made and that those adjustments must be based strictly on financial need.

Group 9

Discussion in this group was very lively inasmuch as there was representation from both the public and private sector in higher education, including a financial assistance officer and a student.

Feelings ran high with regard to the criteria presented and there was little problem with arriving at the decision that financial need be the first and foremost requirement for financial assistance. Inasmuch as a financial assistance officer was in this group, there was high recognition of the fact that there would be limited funds and unlimited numbers of requests for those funds. For this reason, the group reviewed each of the criteria and ranked them. There was consensus in most areas, and it should be noted that scholastic ability was considered very closely allied with need in determining assistance. There was a philosophical concern for the student who shows potential, but at the same time, the group recognized that a mechanism should be provided for those who have less obvious potential. Ability should be more clearly defined so as not to exclude those who are work-oriented but not academically-achieving.

There was strong feeling that state funds remain in the state. It should be noted that there was equally strong feeling that equal access be given to every student to use the funds anywhere in order to provide for open access to education.

Criterion Number 1- Financial Need--An individual view of the PCS is needed in order to assess more correctly a student's need. Princeton does a fine job, but variables are not always considered. There is an inequity involved when real property values are counted heavily in assessing a family's ability to pay. Here it becomes advantageous to be burdened with a mortgage or with loans. This would indicate almost that thrift is penalized.

Scholastic Ability--This was considered a close tie in with need in determining assistance. (See explanation above.)

Criterion Number 3- Number of Postsecondary Years Completed--It was felt that demonstrated past achievement should be a variable. This probably has a lower ranking than need or ability.

Criterion Number 4- Type of Institution--There was a consensus that this has a low priority. There was strong feeling by one member, however, that he would favor support for public institutions because the dollars would go further.

Criterion Number 5- Location of Institution--There was very strong feeling that funds should stay in the state on the assumption that there would be the barest of monies available and that equal access be given to students to use funds anywhere in Rhode Island. If more dollars should become available, there was feeling that those funds could be utilized to support the student who goes to school out-of-state.

Criterion Number 6- Student's Age--There was a feeling expressed that by aiding the youngest, there would be more general productivity to society. The older student, however, should be considered in assessing need on an individual basis.

Criterion Number 7- Part Time vs. Full Time--Part-time students sometimes are penalized because of the additional dollars that they bring in to support themselves as against the full-time student who relies almost totally on financial assistance. There was consensus that there should be no difference in determining the distribution of funds relative to this criterion.

Criterion Number 8- Student Programs--There was consensus that this has a very, very low priority. Should this be a determining factor, it would smack of paternalism. There should be some consideration given to the economic stability and needs of the community, however, but very little in determining financial assistance.

Explanations Offered to Support Ranking Choices

Forum participants were asked to explain the values which led them to their particular choices of each criterion on special forms.

Of the sixty-two ranking sheets filled out, only twenty-two respondents completed the form as fully as instructed; the other forty either failed to complete ranking all eight criteria or indicated their refusal to do so. Twelve respondents indicated somewhere in their comments a desire to see need and ability combined in some fashion. It was also clear that the comments revealed significant misunderstanding of the meaning of the issues involved in the criteria.

The explanations did, however, provide the respondents with an additional opportunity to share their views on financial assistance for postsecondary education. What follows is a summary analysis of all the comments made on the ranking sheets.

1. *Financial need:* Eight of the respondents indicated that it was the only relevant criterion, which was second in number only to those wishing to see it combined with ability. Other explanations offered in decreasing order of frequency were: "To increase opportunity," "to equalize opportunity," "what it's all about," "obvious."

2. *Ability:* Twelve of those offering explanations to this issue wanted to see it combined in some manner with financial need. Six indicated a desire to see the method of defining ability refined and another six responded that it should not be restricted to an "academic" definition.

Six respondents indicated a preference to see ability linked in some manner with motivation. Others commented on the recipients' ability to benefit and on seeing ability balanced with achievement.

3. *Time enrolled:* Twelve respondents indicated that part-time students deserve some consideration for financial assistance. Five other respondents indicated, however, that full-time students deserve priority. One respondent suggested that the state should not subsidize those who receive salary increments for additional credits, i. e. teachers.

4. *Number of years completed:* There was no clear consensus on this issue and a number of responses indicate that there was a certain confusion as to its meaning. Four respondents indicated that the state's financial assistance program should help to keep students from "dropping out" as a result of financial need while another four felt that it should be concentrated at the lower levels.

5. *Location of institution:* Only one respondent indicated that the Rhode Island financial assistance program be exclusively restricted to Rhode Island institutions. Ten people indicated that financial aid should be allowed for students enrolled in an out-of-state program of study provided that no equivalent in-state program is available. Seven

respondents indicated that aid could follow a student out-of-state provided that reciprocal agreements were made, while five said that it was not a relevant concern.

6. *Type of institution:* Only one respondent indicated that proprietary schools be ineligible to accept financial aid. All other respondents voiced a desire to allow students to attend the institution of their choice, regardless of type.

7. *Student's program of studies:* While there were few explanations offered for this criteria, there were strong negative expressions of its validity. Several said "never" and one said "this scares me." Seven said that the employment of this criterion would abridge the individual's freedom of choice.

8. *Age:* Four respondents indicated that aid should be concentrated in the 18-25 age group while five thought that some aid should be available for older students. Eight respondents, however, said that this was an "unimportant" or "irrelevant" criterion.

Post-Conference Ranking of the Eight Criteria

Table 2A displays the distribution of Rank Preferences to the Eight Criteria by the number of responses to each criterion.

It should be noted tht sixty-two respondents returned questionnaires to group recorders for analysis; however, every respondent did not choose to rank each criterion in every case. For example: For the criterion of Student's Age, one may observe that of the sixty-two respondents, twenty-seven chose not to indicate a rank for that criterion.

Table 2B displays the distribution of Rank Preferences to the Eight Criteria by the percentage of responses. It must be understood that such percentages are based only on the number of "legitimate" responses; i.e., only those cases where participants choose to rank the criterion in question. All blank responses were disregarded in computing percentages.

In many cases, participants explained their reasons for not considering a particular criterion or sets of criteria. Such responses were treated in the preceding section so as not to confuse their illegitimacy of format with any invalidity of judgment.

For convenience, we will employ Table 2B as a basis for our observations of the response patterns.

1. Financial Need

Clearly this criterion was seen as foremost for judging students for financial assistance. Of the eight possible criteria, there was least disagreement about this value. One can observe that only seven percent of the respondents ranked this criterion as being second in importance.

TABLE 2

A

Post-Conference

Distribution of Rank Preference to
Eight Possible Criteria for Financial Assistance Determination
by Number of Responses

CRITERIA	Resultant Rank	Number of Responses by Rank Preference								Blank Responses	Number of Total Response
		1	2	3	4	5	6	7	8		
Financial Need	1	56	4	--	--			--	--	2	62
Scholastic Ability	2	2	48	3	--	--	--	--	--	9	62
Time Enrolled	3	--	1	16	19	3	1	--	1	21	62
Number of Years Completed	4	--	3	12	9	6	6	2	--	24	62
Location of Institution	5	--	1	8	7	12	4	5	4	21	62
Type of Institution	6	--	--	6	5	5	14	5	2	25	62
Student's Program of Studies	7	--	--	1	2	2	7	15	8	27	62
Student's Age	8	--	--	1	--	9	1	5	19	27	62

B

Distribtuion of Rank Preference to
Eight Possible Criteria for Financial Assistance Determination
by Percentage of Responses

CRITERIA	Resultant Rank	Percentage of Responses by Rank Preference								Resultant Score
		1	2	3	4	5	6	7	8	
Financial Need	1	93%	7%	--	--	--	--	--	--	1.08
Scholastic Ability	2	4%	91%	6%	--	--	--	--	--	2.04
Time Enrolled	3	--	2%	39%	46%	7%	2%	--	2%	3.68
Number of Years Completed	4	--	8%	32%	24%	16%	16%	5%	--	4.19
Location of Institution	5	--	2%	20%	17%	29%	10%	12%	10%	5.01
Type of Institution	6	--	--	16%	14%	14%	38%	14%	5%	5.40
Student's Program of Studies	7	--	--	3%	6%	6%	20%	43%	23%	6.68
Student's Age	8	--	--	3%	--	26%	3%	14%	54%	6.87

2. Scholastic Ability

Under this criterion, it can be observed that the overwhelming majority of respondents selected "Scholastic Ability" as the second most important criterion (91%). On the aggregate, there is consensus that this item should be ranked no lower than third in importance, since there were no indications that this criterion be ranked four through eight. One might assume that the intensity of disagreement is minimal here, since the range is small and the numbers contributing to the range is low.

3. Time Enrolled

The method of analysis ranks "Time Enrolled" as the third criterion in terms of importance (resultant score: 3.68).

There is, however, considerable disagreement as to the relative value of this criterion for financial assistance determination. Twenty-one of the sixty-two respondents did not consider this criterion. In addition, one may observe that fifty-seven percent of the respondents would disagree with placing this criterion third.

When one considers that the plurality of respondents placed this item as fourth, concluding that this is the third most important criterion becomes doubtful.

4. Number of Years Completed

Here we can observe that the plurality of respondents (32%) indicated that "Number of Years Completed" should be considered as the third most important criterion. The relatively high disagreement about the value of this criterion enters into the statistical analysis of the responses, thereby adjusting the placement of this item as fourth in importance.

Perhaps the greatest problem in identifying the relative priority of criteria rests between "Time Enrolled" and "Years Completed".

5. Location of Institution

It is within this criterion that we observe the greatest disagreement on relative value. Participants responded that this item should be considered from second through eighth in relative importance; no other criterion holds such a varied response pattern. This variety of rank preference indicates some degree of disagreement; but since there is no evidence of the clustering of response at the extreme rank values, we should not assume polarization of the participants on this issue.

6. Type of Institution Attending
7. Student's Program of Studies
8. Student's Age

In light of the fact that at least twenty-five of the sixty-two participants failed to respond to these criteria, any observations of the response patterns must not be regarded as conclusive.

It may be noteworthy to indicate that the resultant rank for each of the three criteria match the plurality rank preference for each criterion.

For example: the plurality of respondents designated "Student's Age" as being ranked eighth in importance, and the resultant rank also placed this item as last.

Allocation of Resources

Participants in the forum were asked to simulate the allocation of resources to student types by using the top three ranked criteria in the order selected by their groups.

In the brief time allotted to this task, many failed to clearly understand the instructions for the completion of the simulation instrument. As a result, a high percentage of responses must be regarded as invalid. Further, many failed to make the required choices. The most common manifestation of this was the ranking of every criteria as being of the first priority.

In the areas of financial need and scholastic achievement, however, the responses were sufficiently clear to make several observations.

Thirty-three forum participants completed the allocation task for the criterion of Financial Need.

Twenty-six ranked the categories in the following order of priority.

1. Sizeable Financial Need
2. Moderate Financial Need
3. No Financial Need

Three respondents placed moderate need first; two indicated sizeable need was the only criterion, and two placed equal weight on moderate and sizeable financial need. Of those who filled out a percentage for these categories (22) only one indicated that some portion (10%) of aid monies be allocated to students of no financial need. Thus, 26 out of 33 participants rated Sizeable Financial Need as the first priority for financial assistance.

In the area of scholastic achievement, thirty-one forum participants returned completed ranking instruments.

Seventeen said that money be allocated in the following order of priority:

1. Superior achievers
2. Average achievers
3. Below average achievers

Five thought that average achievers deserve priority over superior achievers but all twenty-two indicated that below average achievers be last.

Nine respondents indicated that all three categories be given equal weight, or, to put it more simply, that this criterion should not be a significant factor in allocation of financial aid.

Evaluation of the Forum

Participants in the financial aid forum were asked to rank criteria to be employed for the selection of recipients in consideration for Financial Aid. A questionnaire titled "Sound Off" was developed in an attempt to determine the validity of the results of the conference and the general reaction of participants to forum activities. Also included in the evaluation instrument were questions of a more general nature which were an attempt to secure feedback from conference participants which might prove useful in planning future community forums. To ensure that the evaluation exercise was sufficiently comprehensive, ample opportunity was provided for comment on all aspects of the conference. All participants comments are listed after each question.

****

		Yes	Some-what	No
1.	Do you think the Forum was well organized:	41	4	1
	a. *Four commented on the conference starting late.*			
2.	Did you find the materials and documents useful?	29	16	0
	a. *Should be sent out earlier so more attention can be given to them.*			
	b. *Response sheets B were no good because criteria were too simplistic.*			
	c. *I learned more from the discussion.*			
	d. *Well documented and researched.*			
	e. *Background of present policy would have helped.*			
	f. *Have not read them.*			
	g. *Too wordy.*			
	h. *Good job on number 4.*			

		Yes	Some-what	No
3.	Were the instructions for your involvement clear?	31	13	1
	a. *Yes, but not followed in group.*			
	b. *Too wordy.*			
4.	Do you feel better informed or more knowledgeable about the problems of financial aid as a result of this session?	24	15	7
	a. *I think the opportunity to discuss financial aid problems was useful.*			
	b. *What was resolved?*			
	c. *Problems have been clarified and my positions and others have been polarized.*			
5.	Did you feel you had an adequate opportunity to make your views known on this issue?	37	6	3
	a. *Yes*			
6.	Do you feel that your participation in this conference was a worthwhile use of your time?	37	8	1
	a. *Yes*			
	b. *Would like more opportunity to have my opinions considered and used in the final determination.*			
7.	Was your group leader sufficiently prepared and informed?	38	4	2
	a. *Yes and patient.*			
	b. *Tried but unqualified to direct or stimulate workshop.*			
	c. *Very fine selection with good understanding of problems and leadership.*			
	d. *Very good.*			
8.	Did you approve of the structure and format of tonight's conference?	31	11	4
	a. *Yes*			
	b. *Failure to follow schedule.*			
	c. *Perhaps an end ultimation should be agreed on.*			
	d. *Time could have been better spent on specific issues.*			

	Yes	Some-what	No
e. *Not enough time--should be a full-day seminar. Exploration of the issue had to be superficial.*			
f. *But too short.*			
9. Did you feel tonight's topic was sufficiently important to warrant holding this forum?	41	4	0
a. *You had better hold more.*			
b. *Yes*			
c. *Uncertain as to relevance and real need for forum.*			
10. Do you think that the expression of views by the participants tonight will have any effect on policy decisions?	12	25	8
a. *I hope so.*			
b. *I would hope so.*			
c. *They had better.*			
d. *The study group will decide as will the Commissioner.*			
e. *I sincerely hope so.*			
f. *I'd like to think so.*			
11. Do you think that the participants in tonight's meeting are adequately representative?	21	14	8
a. *Could have been more students.*			
b. *As a whole in my group but not enough students.*			
c. *Should have more student involvement and parents of secondary age students.*			
d. *Really don't know whose is here.*			
e. *Ultimate decision-makers were not here.*			
f. *Mostly of institutions, however,*			
g. *But I'm not sure at everybody.*			
h. *More public involvement needed (parents-taxpayers-students).*			
i. *Invite: (1) high school students and (2) proprietary and correspondence institutions.*			
j. *My guess is that professional educators are disproportionated represented.*			

	Yes	Some-what	No
k. *Not enough students, institutional staff (like financial aid officers).*			
12. Do you think tonight's issue warrants additional public involvement prior to decision-making?	36	8	0
a. *I don't see how you can realistically do more than this.*			
b. *Absolutely*			
c. *Public education would be helpful.*			
d. *Invite parents to attend.*			
e. *That depends what the end result of this forum is. Perhaps a referendum should be offered in the fall elections to determine the public's desire.*			
f. *Students and parental decision-making.*			
13. Were the 8 criteria presented for your ranking sufficient? (indicate, other, if any).	18	3	19
a. *Say criteria concerning the student as a person are absent.*			
b. *Not well organizes or mutually exclusions.*			
c. *Combination of need and scholastic ability.*			
d. *Motivation*			
e. *I felt the criteria were ambiguous and that this generated unneeded confusion in the discussion.*			
f. *Some need for better definitions.*			
g. *No need to fear a 9th category if 95% of those asked "voted" for need and talent.*			
h. *Thought criterior structured no method of innovative.*			
i. *Type of person involvement in community or extra-curricular if a high school, etc.*			
j. *Yes*			
k. *I think they were too many.*			
l. *Another criteria was added, grouping need and ability.*			
m. *Three through eight were too nebulous and individual for thorough discussion in five minutes.*			
n. *Overly simplistic and in some cases very vagued and for ill defined.*			

o. *The eight presented were in need of clarification. Problems with semantics and definition. What about Veterans inability to support his education by the G.I. Bill.*

p. *Criteria were simplistic and require more definition.*

q. *The number of criteria was O.K., but they were far too simplistic.*

r. *They were sufficient to start a discussion, but most often were not very relevant to act as a criteria for a general financial need selection.*

s. *Some of the criteria were a little vague and perhaps not a means for deciding whether aid should be given.*

t. *Community or society needs should have been included, perhaps to replace "Student's Program of Studies and/or Type of Institution Attending."*

u. *Most were unnecessary--since financial need is evident.*

14. When do you prefer conferences scheduled: In the evening, during the day, on weekends? (please circle one)

a. *Twenty-five -- in the evening.*

b. *Seventeen -- during the day.*

c. *Two -- on weekends.*

15. Would you like to make additional comments on tonight's conference?

a. *I feel inequities in our present award system has to be revised--to include the needy, middle income students.*

b. *I find financial need the number one criterion and all others secondary. Other areas are so broad that from my point of view they are all relative. The idea of scholastic ability poses an immediate problem. In this case, we should address ourselves to the question of scholastic ability by what measures and the how. More attention should be paid to need of Veterans in particular and the issues brought forward for the state to take some action in light of Federal Goals in action.*

c. *Thanks for the opportunity to participate.*

d. *I would require additional time to discuss this vital issue. It would seem appropriate to have future involvement in this area of setting priorities for Rhode Island.*

e. Give each particpant a list of names of people in his group and their affiliation.

f. Perhaps we should have different groups discuss different segments of the problem instead of all groups handling all segments. (If only because of time consideration).

g. Need more time to discuss and define terms.

h. It was "programmed" to reinforce 32/24 response survey. Persons invited to this meeting should have been invited to the "planning" meeting so that their input could have been presented and included before it was presented to them.

i. Greater depth of discussion for such important issues is needed.

j. Found it difficult to feel certain we were all considering the same kind of financial assistance.

k. Appreciate opportunity to contribute to this kind of decision-making.

l. Eminenty fair and full meeting--thank you.

m. Suggest role playing for next conference.

n. Introductory speakers unnecessary. Failure to start on time. Conference should be confined to a general area--not scattered throughout the building. There is no question about financial need as #1 criteria. The problem is how the funds are distributed and the criteria used in allocating funds to individuals. More people from different background should have the power to allocate funds rather than a state agency.

o. I was operating under the assumption that what we were dealing with was eligibility criteria for the state scholarship. If this was the case, and if what we are concerned with is a comprehension financial aid program which meets the needs of all of the state's students) (rather than just the disbursement of funds from one program) then the ranking approach is premature. Before any ranking of criteria occurs, a careful assessment should occur of all forms of financial aid that are available to Rhode Island residents. Thus, we would be dealing with the problem of whose needs are not now being met, rather than whose needs in a Utopian world should be met first.

APPENDIX A

STATE OF RHODE ISLAND AND PROVIDENCE PLANTATIONS
DEPARTMENT OF EDUCATION
199 Promenade Street, Providence, Rhode Island 02908

Arthur R. Pontarelli, Acting Commissioner

August 29, 1974

An Invitation to

The Forum on Financial Assistance

Tuesday, September 24, 1974

HOW CAN WE PROVIDE THE BEST POSTSECONDARY EDUCATION TO ALL RHODE ISLAND CITIZENS REGARDLESS OF THEIR ABILITY TO PAY?

This question faces Rhode Islanders while educational costs continue to soar. A first step in responding to this issue is to decide on the types of citizens who should receive first consideration in the distribution of limited funds which the state may make available. In coming to grips with this important first step, a Forum is planned to seek reaction from the Rhode Island public as to whom should get priority in financial assistance.

To gain a sense of public sentiment on this issue, a FORUM on Financial Assistance has been planned for Tuesday, September 24, 1974 at Rhode Island Junior College's Warwick Campus. You are cordially invited to be present at this Forum. If you would like to attend, please fill out and mail the accompanying postcards by September 13, 1974.

The Forum can be a great opportunity for all involved. For the government agencies, including the Board of Regents for Education, the Rhode Island Post-secondary Education Commission and the General Assembly, it will provide additional insight in resolving this question they face. For you, it is the opportunity to make your perspectives on this issue known to those who will eventually have to decide in your behalf.

APPENDIX A

PLEASE return the attached postage-paid reply cards by Friday, September 13, 1974. If you have any questions, feel free to call:

Rhode Island Department of Education
Office of Planning and Management
Bureau of Postsecondary Education
277-2685

☐ YES, I would like to attend the Forum on Financial Assistance

DATE: Tuesday, September 24, 1974
TIME: 6:30 p.m.
PLACE: Rhode Island Junior College
Warwick, Rhode Island

☐ NO, I will not be able to attend the Forum, but would like to be kept informed of developments in this area.

(Name) _____ (Organization) _____

(Address) _____ (Tel. No.) _____

By completing the brief survey below, you can make the Forum more exciting and valuable for you and other participants. This is an ANONYMOUS response.

Below is a list of eight criteria which may be used to select students for Financial Assistance.

Please rank these criteria into the order which can best be used to choose the kinds of students you believe deserve Financial Assistance. The highest rank is "1" and the lowest rank is "8." This is a forced choice exercise and there should be no ties or blanks.

The documents enclosed may help you in coming to a decision.

_____ Student's Age

_____ Student's Financial Need

_____ Student's Scholastic Ability

_____ Number of College Years Already Completed

_____ Time Enrolled (Full-Time or Part-Time)

_____ Location of Institution (In-State or Out-of-State)

_____ Type of Institution Attending
(Private, Public, Proprietary, Correspondence)

_____ Student's Program of Studies

APPENDIX B

STATE OF RHODE ISLAND AND PROVIDENCE PLANTATIONS
DEPARTMENT OF EDUCATION
199 Promenade Street, Providence, Rhode Island 02908

Arthur R. Pontarolli, Acting Commissioner

September 13, 1974

The Forum on Financial Assistance

September 24, 1974

6:30 P. M.

Rhode Island Junior College

Warwick, Rhode Island

Thank you for your response to attend the Forum on Financial Assistance. The exchange of ideas that will take place between you and other members of the Rhode Island Community will help to shape the future of financial assistance to students of Postsecondary Education in Rhode Island.

We are happy to provide you with additional information to assist in your obtaining a more detailed picture of what to expect on the evening of September 24th.

The Question to be Addressed

The primary question which is to be addressed in forum activities is: "Who should receive first consideration in awarding financial assistance to students of Postsecondary Education?"

Background Highlights

- On May 2, 1974, the Board of Regents for Education adopted a policy that: ".....the inability of individuals to muster sufficient resources to meet their (financial) needs should not be allowed to deprive those individuals of seeking both quality and diversity in their post-secondary experience.....".

-Recent studies by the Department of Education indicate that if merely the 18 to 24 year old Rhode Island population were to attend post-secondary education at a rate equal to those students from the highest income families, their unmet financial need would be in excess of $50 million.

-Before decisions are made regarding who should receive first consideration in awarding financial assistance, the law states that the Board of Regents must ".....seek the advice of those concerned with and affected by its determinations as a regular procedure in arriving at its conclusions and in setting its policy."

Your Role at the Forum: Forum Tasks

On the evening of the Forum, you will become a member of a group consisting of approximately ten people from the business, political, civic and educational community. Your group will be asked to perform the following tasks:

1. To examine the ranking of criteria as determined by the analysis of responses to the brief survey that accompanied your invitation to attend the Forum.

2. To modify or endorse the order in which the criteria were placed by the entire participant body.

3. To identify the values and philosophical bases that underlie the placement of those criteria in the order as agreed by your group.

4. To re-rank the criteria on an individual basis, so that individual responses may be tabulated at the forum for participant review of the changes that may have taken place as a result of further elaboration of the issues.

5. To simulate the allocation of resources to student types by using the top three ranked criteria in the order selected by your group.

How to Prepare for the Forum

To ensure that all participants have some understanding of the issues involved we urge you to review the documents that accompanied your invitation.

Working Note #3

"The Financial Need of Rhode Island Citizens Attending Postsecondary Education: The Present Circumstances."

This document provides information about the number and kinds of people who attend Postsecondary Education and the financial need of these people.

APPENDIX B

Working Note #4

"Determining the Eligibility Pool for a Financial Assistance Program."

This document raises the arguments for assisting various kinds of people who attend Postsecondary Education. This document will play a major role in your group's performance of Task Number 5.

Please bring both of these documents to the Forum on Financial Assistance.

We look forward to seeing you on September 24th.

APPENDIX C

FORUM PARTICIPANTS

ALBANESE, JEFFREY
UNIVERSITY OF RHODE ISLAND

BABCOCK, WILLIAM
UNIVERSITY OF RHODE ISLAND

BACKES, MICHAEL
PROVIDENCE COLLEGE

BERGERON, DON
UNIVERSITY OF RHODE ISLAND

BOUDOIN,GAIL
YOUTH ADVISORY COUNCIL

BROWN, ERIC
BROWN UNIVERSITY

BETTENCOURT, BRUCE
DEPARTMENT OF EDUCATION

BODNER, FAY
DEPARTMENT OF EDUCATION

BROUILLETTE, RICHARD
DEPARTMENT OF EDUCATION

BURELL, WILLIAMS
R.I.H.E. ASSOC. CORP.

BURN, MARGUERITE
R.I.H.E. ASSOC. CORP.

CAISTER, LOUIS DR.
BARRINGTON COLLEGE

CARLEY, KAREN
BRYANT COLLEGE

CASEY, EDWARD JR. A.
R. I. FEDERATION OF TEACHERS

CAYOUETTE, IDA
R. I. CONGRESS PTA

CLEMENT, MILTON
OPPORTUNITIES FOR VETS

CORRARO, PHILOMENA
DEPARTMENT OF EDUCATION

COYLE, EILEEN F.
PROV. HUMAN RELATIONS COM.

CRAIG, GEORGE
BRYANT COLLEGE

DELANEY, JOSEPH P.
JOHNSON & WALES COLLEGE

DE GRAPHENRIED E.
UNIVERSITY OF RHODE ISLAND

DOEBLER, CHAD
PROVIDENCE COUNTRY DAY

EDWARDS, TOM
DEPARTMENT OF EDUCATION

EFROM, BINYAMIN
DEPARTMENT OF EDUCATION

FLANAGAN, WILLIAM, DR.
RHODE ISLAND JUNIOR COLLEGE

GARRAHY, J. JOSEPH, LT. GOVERNOR
LIEUTENANT GOVERNOR'S OFFICE

GIAMPIETRO, JOAN
OLD STONE BANK

GOLDMAN, FREDA
DEPARTMENT OF EDUCATION

GRAZIANO, CATHERINE
SALVE REGINA COLLEGE

HAGAN, JOHN
RHODE ISLAND JUNIOR COLLEGE

HARGRAVE, JAMES
PROV. HUMAN RELATIONS

HEAP, ELIZABETH
R. I. HOSPITAL TRUST

HORMAN, MARILYN
DEPARTMENT OF EDUCATION

HUGHES, BERNADETTE SISTER, C. P.
MT. ST. JOSEPH COLLEGE

HURRY, WILLIAM
RHODE ISLAND COLLEGE

INGLE, CLYDE
DEPARTMENT OF EDUCATION

APPENDIX C

KAPSTEIN, SHERWIN
R. I. EDUCATION ASSOCIATION

KELLY, BRIAN
PROVIDENCE COUNTRY DAY

KENNY, MICHAEL
R. I. ASSOC. SECONDARY PRINCIPALS

KEEGAN, LUCILLE
STATE PLANNING COMMISSION

LATHEN, NELLIE
PROV. HUMAN RELATIONS COM.

LAURIE, JEFFREY
YOUTH SERVICE BUREAU

LIVERNOIS, DENISE
DEPARTMENT OF EDUCATION

LYNCH, MICHAEL J.
BRYANT COLLEGE

LYONS, MARY
BOARD OF REGENTS

MANDRYK, JOHN
DEPARTMENT OF EDUCATION

MASTRODICASA, LINDA
DEPARTMENT OF EDUCATION

McCARTHY, PAT
DEPARTMENT OF EDUCATION

McKENNA, ROBERT J.
RHODE ISLAND SENATE

MENARD, JOSEPH W.
R.I.C. ALUMNI ASSOCIATION

MERRIGAN, PAULA
UNIVERSITY OF RHODE ISLAND

MINIATI, PETER
DEPARTMENT OF EDUCATION

MOORE, PETER
RHODE ISLAND COLLEGE

MORRY, MICHAEL
R. I. ASSOC. SECONDARY PRINCIPALS

NELSON, ROY A.
BRYANT COLLEGE

NERO, JOHN
CAREER ED. PROJECT

O'BRIEN, BILL
DEPARTMENT OF EDUCATION

PETERSON, THOMAS R. REV.
PROVIDENCE COLLEGE

PETERSON, JOHN REV.
PROVIDENCE COLLEGE

ROY, DAVID
DEPARTMENT OF EDUCATION

RAWNSLEY

RYAN, DAN
BRYANT COLLEGE

RYAN, MIKE
LIEUTENANT GOVERNOR'S OFFICE

SAUNDERS, TANYA R.
URBAN LEAGUE OF R. I.

SAPINSLEY, LILA
SENATOR

SCOTT, THOMAS
BRYANT COLLEGE

SHAW, RUTH W.
KATHARINE GIBBS SCHOOL

SHAY, JOHN
UNIVERSITY OF RHODE ISLAND

SHAPPY, ROLAND
ROGER WILLIAMS COLLEGE

SIMON, HAL
OPPORTUNITIES FOR VETERANS

SMITH, ALICE
R. I. CONGRESS PTA

STEVENSON, HARRY
DEPARTMENT OF EDUCATION

STOCKARD, RAY
UNIVERSITY OF RHODE ISLAND

THOMAS, PAUL A.
DEPARTMENT OF EDUCATION

SMITH, LOWELL
BRYANT COLLEGE

TOUGAS, MAURICE
UNIVERSITY OF RHODE ISLAND

VASLET, ALBERT
SENATOR

WARBURTON T.G.
A.C.I.

WEBBER, LORRAINE
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WEISS, RICHARD
TAX ASSESSOR

WEISS, RICHARD
TAX ASSESSOR

WEISS, SARA W.
SALVE REGINA COLLEGE

WHITE, PATRICIA
RHODE ISLAND JUNIOR COLLEGE

WOODBERRY, PETER
DEPARTMENT OF EDUCATION

ZANNINI, FRANK
ROGER WILLIAMS COLLEGE

ZEHRING, JOHN
BARRINGTON COLLEGE

APPENDIX D

Explanation of the Response Analysis Techniques

Tables 1A and 2A display the number of respondents that designated a criterion to be a particular rank.

For example, under student's age: one (1) person believed it should be ranked number 1, two (2) people believed it should be ranked number 2, and so on to where thirteen (13) people believed it should be ranked number 8.

Tables 1B and 2B show the percent of respondents that designated a criterion to be a particular rank.

For example, you will observe that in Table 1B under the criterion of financial need, 77% of the respondents designated that to be ranked number 1 (Note: that Table 1A shows that 26 of the 34--or 77% designated Financial Need to be ranked number 1).

In addition, Tables 1B and 2B display the resultant score that was obtained for each criterion. This score was determined by multiplying the percentage of responses to each rank with the rank value itself and then adding the results for each criterion.

For example, under Financial Need (Table 1B):

77% x rank 1 = .77

21% x rank 2 = .42

3% x rank 8 = .24

Total =1.43

The criteria were then ordered so that the criteria with the lowest scores were assigned the highest rank.